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**Join AAI - Portland Chapter on
SATURDAY, March 10, 2018 9am-12pm**

[Register on-line now](#)



ETF Strategy and Tactics for Investing Success



8:40 AM – Registration

9:00 AM – **ETF Strategy and Tactics for Investing Success**

Neil Leeson, Research Director at Spyglass Trading LP takes a look at exchange-traded fund (ETF) portfolio construction and discusses what to look for when selecting funds from over 1,900 ETF's traded on U.S. Exchanges. He covers how to make ETF construction work in your favor while avoiding the pitfalls, including how to use ETF options, spread strategies and ETF underlying holdings to enhance returns. Attend this meeting to learn:

- Understanding ETFs
- Strategic and tactical positioning of ETFs
- Buying and selling ETFs

About Neil Leeson:

Neil Leeson is in charge of research & product development for Spyglass Trading LP in Dallas, Texas. Leeson produces internal publications that provide ideas for the execution of third-party recommendations using ETFs & individual equities. He also manages equity & ETF portfolios based on technical,

macroeconomic & fundamental trading models/indicators. Leeson is frequently quoted in the financial press (including Barron's, Investor's Business Daily, The Wall Street Journal & CNBC) for his insightful research & views on ETFs.

Leeson has over 22 years of investment research experience, he was the senior international strategist for Ned Davis Research Group (NDRG) and NDRG's ETF strategist & director of advisory services. Leeson was the director of quantitative research at Spyglass Trading & Regal Asset Management. He rejoined Spyglass Trading in 2015.

Leeson holds an MBA from the University of West Florida & a bachelor's degree in psychology from Southern Illinois University - Carbondale.

10:30 AM - Break

10:40 AM - Program continues

12:00 PM – End

LOCATION: East Portland Community Center, 740 SE 106th Ave, Portland, OR 97216

DIRECTIONS: From I-205 take Stark Street exit #20. Drive east on SE Washington, turn right onto SE 106th Ave. The community center is just ahead on the left side of street.

REGISTRATION & COST:

\$20 at the door, beginning at 8:40AM (NO CREDIT CARDS ACCEPTED AT DOOR)

\$15 in advance by 3/8/18, 5 pm with a credit card at: [Eventbrite](#)

\$15 in advance by sending a check postmarked by 3/7/18 to:

AAll Portland Chapter,
PO Box 66034,
Vancouver, WA 98666

Full time student and under 18 is FREE, with student ID. A certificate of attendance is available.

Refund Policy: No Refunds

Save These Dates (upcoming chapter meetings):

~ Saturday, May 19, 2018 ~

"Portfolio Management", by Paul Merriman

~ Saturday, July 14, 2018 ~

"Understanding the Mysteries of Market Breath", by Tom McClellan

"Investing In REITS", by Chris Barry

Announcing our "**INVESTING FROM START TO FINISH**" seminar on September 15th. This special daylong meeting will describe the key steps and benefits of lifetime investing, and have explanatory sessions appropriate for both rookie and seasoned investors. Stay tuned for more details, but mark it on your calendar now and plan to invite family members wanting to improve their investing knowledge and skills.

Chapter Message

Our Jan 13th speakers sent their post-meeting notes, see below. Their presentations are posted on our website at <https://aaiipdx.com/handouts/>

KEEP INVESTMENTS SHAMELESSLY SIMPLE - Terry Atzen is giving members of Portland AAll a 20% discount to his new book, *Keep Investing Shamelessly Simple*, when it is published (expected late February) if they mention their membership to Portland AAll when ordering.

He is also offering Portland AAll members that attended the January 13th meeting to receive his monthly Winner's Circle Updates (which includes a one hour, monthly consultation with him by phone) for his old price of \$365 per year (\$1 per day). Go to www.theinvestmentcompass.com for his contact information.

NEW TAX REFORM LAW UPDATE - Ryan Genor says that the Tax Cuts and Jobs Act will impact all of us. Those impacts will be larger for some and the changes will produce positive and negative results. He noted that he only covered the basics in the short time we had. Some clarity will be provided throughout the year as the IRS will soon come out with guidance for a lot of the complex changes. You can contact him at ryan@schultzgroupcpas.com or (503) 244-8879.

HELP NEEDED! We are volunteers and we need your support. Whether you

can give an hour at the meeting or more to help keep the group growing strong, we'll appreciate all you can do for the chapter. We could use help at meetings to video speakers, help set up sound or the computer/projector, keep the refreshment table tidy (or pick up refreshments). We also need people to fill the following positions:

~Registrar & Assistant Registrar—develop list of attendees, take payments at the door and mail in registrations, create registration records, print nametags.

~Marketing Chair & Social Media Coordinator—develop marketing plan, assist in developing content for website and Facebook pages, press releases, etc.

~Videographer—film presentations, when approved

~Membership Chair—meet, greet, answer questions, etc.

PDX Income Investor's Sub-Group.

Contact: Andy Prophet, Group Chairperson, andyprophet9@gmail.com , to get on the mailing list for up-coming meetings.

The upcoming meeting will be on: **Sunday, March 4, 2018**, 1:30 to 3:30 PM..

For more info, check: <https://aaiipdx.com/income-sig/>

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